

2017 Plan and Budget Processing

Instructions

1. User will access <http://dbhdid.ky.gov/kdbhdid/default.aspx> and click on **Community Mental Health Centers** on the left navigation bar, then select **Plan and Budget Information 2017**. Under “**General Information**”, select **Forms Library** (use the drop down box to select if you would like to view the list by name, number or Division).
2. Click on the **Forms Library** you selected.
3. Scroll down until you find the form you want.
4. Click on the form and a box will open asking if you want to open or save the document.
5. Click on **SAVE** and a box will open asking you to point to the location on your P/C where you want the document stored.
6. Save the document to the appropriate folder on your P/C. If you are not sure where to save the form, save it to your **Desktop**.
7. Click on **SAVE** in the lower right corner of the open box. This will put a copy of the document on your P/C with the form name assigned by **DBHDID**.
8. This will return you to the **Forms Library** page. At this point, you can copy additional forms into your P/C, just start again at **step #3** or if finished, you can exit the website.
9. After you are done on the web, you may go to your P/C and rename the form on your P/C to anything you want, although, we suggest you keep the download name if possible.
 - a. **Do NOT change the form to another document type, such as changing from Excel to Access.**
10. At your convenience, fill out the form and send it through your Center’s approval process.
11. We recommend that all forms be placed in a single folder **AFTER** they have been completely filled out and approved. This will make the submission of the form easier.

To submit the completed form: Enter the **Central Login** <https://dbhdid.ky.gov/Login/Secure/Login.aspx> using your assigned username and password. Once you are logged in, at the top of the page under Files & Data click on **Plan and Budget File Submission**

12. The first drop-down (**Select Division**) box is for **Division (AFM, MH, ID, SA)**. Select the appropriate Division.

13. The next drop-down box is for the form **ID**. Click on the **Select Form** drop-down box and you will see a list of forms. Select the appropriate form from this list.
 - a. This should be the same form you selected in step #4 above.
14. Unless this form is 101 or 102, you have done all you need to do to name the submission.
 - a. If the form is used by more than one Service (like the **101-Project Budget & Financial Reports**), the system will ask you to select which Service this form applies to.
 - b. There will be a drop-down box with **Services** as the choices.
 - c. Select and click the correct Service.
15. The new name will display in the **Submit Name** box below the **Select Form** box. The Submit form name will look like this (CC_XXX_###-aaaaa_Ssssss.doc/xls).
 - a. The system will pull the extension (.doc or .xls) from the form you selected. This is why you cannot convert a form into a different type.
16. Click on the **BROWSE** button next to the **Browse File to Submit** box. This will open up your P/C. Go to the location containing the form you want to submit and double click on it (see step #11 above). This will put the form in the **Browse File to Submit** box.
 - a. Step 20 may be done before step 16, however BOTH must be done before the system will allow you to submit the form.
17. If everything looks OK, click on the **SUBMIT** button.
 - a. NOTE: this does NOT change the file on your P/C. This names a copy of the form and sends it to the Department.
18. That's it! You're done. You can logout. Now the system takes over.
19. The system sends the copy of the form you submitted to the IPOP computer with the name you created. This is behind a firewall and completely secure. The form is loaded into your folder at IPOP and will be listed with all other forms you have submitted.
20. The system also generates an e-mail to the liaison at the Department AND the individual designated by the Center. It will state that this specific form (Submit Form Name) has been submitted by Center #CC and will be available to the Department by the beginning of the next working day.
21. In the unlikely event that something prevents the form from reaching its final destination, the Department liaison will know by the beginning of the next work day and can start recovery proceedings.
 - a. The form you completed is still on your P/C and could be resubmitted using the same process.
 - b. NOTE: any form re-submitted with the same name will over-write the previous form at IPOP and in the Department folder as well as change the original submission date. (In order to keep your original submission date intact, you can email **re-submissions** after the due date to the Department Liaison and copy Maria Browning at Maria.Browning@ky.gov. Maria will manually upload them to the appropriate folder. Do not send initial submissions via email unless requested by the Department).

22. This form, along with all other forms received, will be transmitted to the Department computer at different times during the day. Again, this transmission is completely secure.
23. Upon receipt at the Department, the form will be loaded into appropriate folders and available to the Division representative for processing.
- On the Department computer, there are a series of folders for each Center with sub-folders for each Division. Thus form 101-Project Budget and Financial Report for the Early Childhood Mental Health service for Bluegrass will be named **15_MH_101-Project Budget and Financial Report_Early_Childhood_Mental_Health.xls** and loaded in the Bluegrass folder / the MH sub-folder.
24. The date the form was submitted will be loaded into the Plan and Budget 2017 report as the Received_Date.
25. The Department will process the submitted form and enter an Approved_Date into the report when they have fully approved the data on the form.
26. To see the Plan and Budget reports, Sign-on to the "Region Reports & Upload" page. Go to the Central Login page <https://dbhdid.ky.gov/Login/Secure/Login.aspx> and click on the **Reports** drop down box.
27. Under the **Reports** drop-down box, there are 3 Plan and Budget Reports.
- Plan & Budget Reports **Due** for FY
 - Plan & Budget Reports **Listing** for FY
 - Plan & Budget Reports **Status** for FY

If you have any questions or need assistance with this process, please contact Maria Browning at Maria.Browning@ky.gov or by phone at (502)782-6112.